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# Consumer markets abroad

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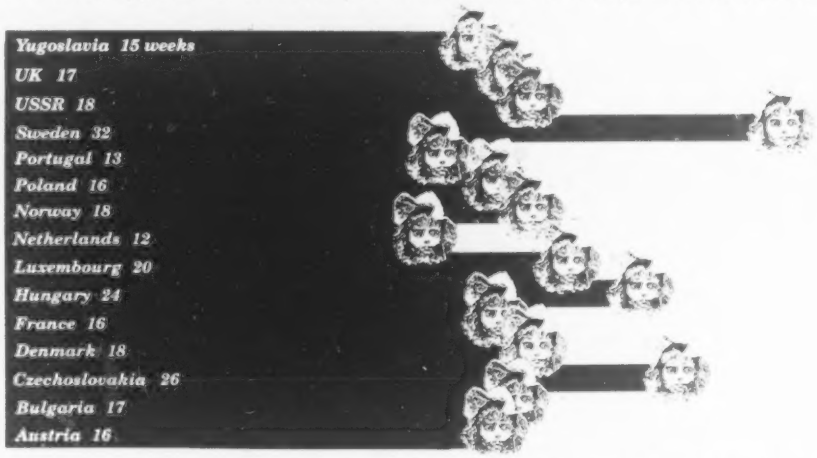
## EUROPEANS PROMOTE PROSPEROUS PARENTING

**WHERE BABY BENEFITS ARE BEST**
*In terms of leave, Sweden offers the greatest support to working parents.*
*(Duration of parental leave for first birth at 90–100% pay, in weeks, 1987)*




*Source: Klinger, Dr. András, "Policy Response and Effects," Plenaries, European Population Conference 1987, Central Statistical Office of Finland, Table 2, p. 404.*

**Coming next month... The Caribbean Basin: Learn why these islanders may not be as similar as you think.**

What do pregnant women in Europe get that pregnant women in the U.S. don't? Peace of mind on the job. In an effort to encourage larger families in today's dual-income world, European governments have minimized the economic uncertainty that comes with juggling work and family. Time, money, and job security not only make parenting possible but also create an opportunity for marketers to service the growing demands of about 6 million new parents each year.

Unlike the ad hoc maternity arrangements that abound in American offices, comprehensive coverage during and after pregnancy characterizes the European workplace. Maternity benefits, paid maternity leave, and family allowances are often required by law, and in some cases are enhanced by private employers.

Every European country except Denmark gives a cash bonus to women immediately upon delivery (a maternity benefit), which ranges from 24 percent of the average monthly wage (in Austria) to 425 percent of the average monthly wage (after the third birth in France). Those payments are designed to defray the new costs that all parents face for diapers, rattles, and other baby-care supplies.

Maternity payments usually do not vary with a woman's income, but some countries qualify their bonuses to reinforce healthy habits: Swiss women re-

*(continued on p. 9)*



FORMERLY INTERNATIONAL DEMOGRAPHICS
VOLUME 7 NUMBER 2 FEBRUARY 1988

# *MEASURING* GLASNOST *IN AND OUT OF THE U.S.S.R.*

**Joint ventures are now possible in the world's third largest country, but only for those companies that understand what *glasnost* and *perestroika* mean to the average Soviet citizen.**

Chinese officials may think they've seen everything now that Colonel Sanders looms larger than life over Chairman Mao's mausoleum. But their surprises are not over—at least not until the doors of Pizza Hut open on one of Leningrad's major thoroughfares, such as Nevsky Prospekt. And recently the Soviet Union has begun to follow the Chinese example with more than just fast food.

The open door is a symbol of the pragmatic mood that is sweeping countries in the economically frenzied eighties. New Soviet initiatives characterized by General Secretary Mikhail Gorbachev as *glasnost* (openness) and *perestroika* (restructuring) follow nearly ten years of change in the People's Republic of China—change that has shown how market activity and democratic debate can fare in a communist society.

But the Soviet experiment, whose emphasis on market activities has been hailed in the Western media, is hardly a monolithic effort. In 1988, the 286 million Soviet citizens, who represent 150 ethnic groups (of which "Russian" is only one) and who live on two continents, will be affected by *perestroika* in dramatically different ways. The U.S.S.R.'s complex demographics will figure significantly in determining those unequal effects.

If Gorbachev's campaign continues as planned, however, one group sure to enjoy success in the coming years will be patient exporters who explore the new Soviet arena to test their marketing skills.



### *WHAT HAS CHANGED*

*Perestroika* aside, the U.S.S.R. has been conducting business with the United

***A LAND OF ELEVEN TIME ZONES***

*Few people outside the Soviet Union (area in square miles: 8.6 million) realize that the trip from Leningrad to New York is shorter than the trip from Leningrad to the eastern city of Vladivostok, U.S.S.R.*

*Sources:* Current History, *October 1987, and NYSTROM Division of Carnation Company, Chicago, No. DD51.*

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States for years. Pepsis have quenched many a Soviet's thirst since the first soda was made there in 1974. (Discussions for the bottling franchises began as far back as 1959.) Since the ruble is of little value in Western markets (as a nonconvertible currency), Pepsico has been paid in vodka by the caseload.

Today, for the first time since the days of Lenin, joint ventures are replacing the franchise as the legal and preferred form of business activity. Under new Soviet law, foreign corporations are permitted to own up to 49 percent of a business in the Soviet Union. Although the operation must be run by a Soviet citizen, management is split between the foreign and the local interests. American companies must get an export license from the U.S. government before they can conduct business with the Soviets to ensure that they do not trade sensitive equipment.

To date, nearly a dozen corporations have signed joint ventures with the Soviet Union, and at least 50 more have expressed an interest. Significantly, the companies with long-standing Soviet relationships, such as Pepsico, are most interested so far. They are familiar with the bureaucratic obstacles, and they have a network of Soviet contacts. Other corporations exploring joint ventures include Combustion Engineering, Honeywell, Cummins Engine, Occidental Petroleum, Ben and Jerry's Homemade Ice Cream, Monsanto, Archer Daniels Midland,

***TWO COUNTRIES IN ONE***

*Central Asian republics have grown dramatically, while European republics (in the Slavic and Baltic regions) have barely grown at all.*
*(Population in thousands and urban percentage of U.S.S.R., 1959, 1985, 2000; annual growth rate 1959–85, in percent)*

| | 1959 | | 1985 | | 2000 | 1959–85 annual |
|---|---|---|---|---|---|---|
| U.S.S.R. | pop. | % urban | pop. | % urban* | pop. | % growth |
| **U.S.S.R.** | 208,827 | 48% | 278,857 | 66% | 311,637 | 1.10% |
| **Slavic republics** | | | | | | |
| R.S.F.S.R. (Russia) | 117,534 | 52 | 143,861 | 73 | 150,931 | .77 |
| Ukraine | 41,869 | 46 | 51,186 | 66 | 53,206 | .77 |
| Belorussia | 8,056 | 31 | 10,028 | 63 | 10,831 | .84 |
| Moldavia | 2,885 | 22 | 4,169 | 46 | 4,700 | 1.40 |
| **Baltic republics** | | | | | | |
| Estonia | 1,197 | 56 | 1,536 | 72 | 1,590 | .95 |
| Latvia | 2,093 | 56 | 2,609 | 71 | 2,667 | .84 |
| Lithuania | 2,711 | 39 | 3,587 | 66 | 3,874 | 1.07 |
| **Transcaucasus** | | | | | | |
| Armenia | 1,763 | 50 | 3,368 | 68 | 4,031 | 2.41 |
| Azerbaydzhan | 3,698 | 48 | 6,749 | 54 | 8,922 | 2.25 |
| Georgia | 4,044 | 42 | 5,270 | 54 | 5,917 | 1.01 |
| **Central Asia** | | | | | | |
| Kazakhstan | 9,295 | 44 | 16,124 | 58 | 20,036 | 2.07 |
| Kirgiziya | 2,066 | 34 | 4,060 | 40 | 5,683 | 2.50 |
| Tadzhikistan | 1,981 | 33 | 4,620 | 33 | 7,206 | 3.07 |
| Turkmenistan | 1,516 | 46 | 3,282 | 47 | 4,877 | 2.83 |
| Uzbekistan | 8,119 | 34 | 18,410 | 42 | 27,166 | 2.98 |

* *Percentage urban for 1986.*

*Sources: Kingkade, W. Ward, "Demographic Trends in the Soviet Union," in* Gorbachev's Economic Plans, *study papers submitted to the Joint Economic Committee, Congress of the United States, 1987, tables 2 and 3.*

SSMC (sewing machines), and Dresser Industries.

### *FIRST THINGS FIRST*

As Gorbachev has made abundantly clear, the Soviet economy needs basic foreign technology to move into the 21st century on an equal footing with other industrialized countries. In addition to attracting foreign capital, it must get its domestic house in order. The growth in the gross national product, which hovered at an annual 2.5 percent in the early 1980s, must double, according to the Twelfth Five Year Plan (1986–1990). As of January 1, 1988, the State Enterprise Law required 37,000 firms to be responsible for profits and losses for the first time in nearly 70 years.

Even more disturbing for factory managers and workers alike is the fact that their output is scrutinized periodically for *gospriemka,* or quality control, by the state inspection agency. In some cases, 20 to 30 percent of all goods in a factory are rejected by inspectors because their quality is low. "Working for the storehouse," a Russian expression for producing goods that never reach the store shelf, is no longer an acceptable practice. Government officials also are pressing for more exportable goods. For a worker who makes about 2,340 rubles (US$3,840) a year, the new disruptions at work may seem hardly worth the trouble.

### *SKELETONS IN THE CLOSET*

The Soviet Union's 1988 population of 286 million people, estimated by the U.S. Census Bureau's Center for International Research, has relatively few men, especially in older age groups, and has a growing ethnic mix.

Overall the Soviet population will grow by 0.8 percent this year, according to Census Bureau estimates. Nationally 26 percent of all Soviets are aged 15 or younger, and 9 percent are 65 and over, but regional statistics diverge from the averages—a situation explained by the increasing ethnic differences.

In fact, ethnicity has become such a sensitive political issue in the U.S.S.R. that U.S. demographers think Soviets deliberately delayed the release of regional age distributions from the 1979 census (the most recent census taken). Soviets in the European republics, primarily Slavs and Balts, have traditionally held the most powerful political positions. But they may become a minority in the twenty-first century. Average annual population growth between 1970 and 1980 in Russia (Russian Soviet Federated Socialist Republic [R.S.F.S.R.]) and in the Ukraine was only 0.6 percent.

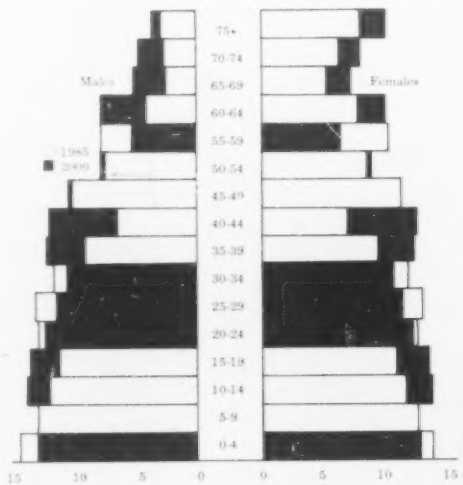
Soviets in Central Asia are predominantly Muslim. They speak little Russian, and they are less educated than their northern counterparts. They are also increasing rapidly in number. Dur-

***THE BIGGEST CITIES***
*More than twenty cities in the Soviet Union have at least one million people.*
*(Population in thousands, 1982)*

| *City* | *Pop. in 1982* |
|---|---|
| Moscow | 8,302 |
| Leningrad | 4,722 |
| Kiev | 2,297 |
| Tashkent | 1,902 |
| Baku | 1,616 |
| Kharkov | 1,503 |
| Gorky | 1,373 |
| Minsk | 1,370 |
| Novosibirsk | 1,357 |
| Sverdlovsk | 1,252 |
| Kuibyshev | 1,243 |
| Dnepropetrovsk | 1,114 |
| Tbilisi | 1,110 |
| Odessa | 1,085 |
| Erevan | 1,076 |
| Cheliabinsk | 1,066 |
| Omsk | 1,061 |
| Donetsk | 1,047 |
| Perm | 1,028 |
| Kazan | 1,023 |
| Ufa | 1,023 |
| Alma-Ata | 1,001 |

*Source: "Naselenie S.S.S.R.: Spravochnik," Moskva:* Izdatel'stvo politicheskoi literatury, *no. 12, 1983, p. 28.*

***THE LOPSIDED FUTURE***
*Soviet women will continue to outnumber Soviet men in older age groups to the year 2000.*
*(Population by age group, 1985 and 2000, in millions)*




*Source: U.S. Bureau of the Census, estimates and projections.*

ing the 1970s, the average annual population growth in the republics of Tadzhikistan and Uzbekistan amounted to 3.0 and 2.9, respectively.

Slavs accounted for 72 percent of the population of the U.S.S.R. in the 1979 census, Balts accounted for 2 percent, Muslims accounted for 17 percent, and a variety of ethnic groups made up the difference. Projections show that by the year 2000, the Slav share will decline to 70.5 percent, Balts will grow slightly to 2.6 percent of the population, and the Muslim share will rise to 21 percent. Party leaders fear that these proportional shifts bode poorly for the future of the country.

A Muslim woman in the Central Asian republic of Tadzhikistan, for instance, has an average of six children in her lifetime. A woman from Russia (R.S.F.S.R.) has an average of two.

Recently, a concerted effort has been made by government planners to narrow that gap among ethnic groups by expanding maternity benefits and health care. The benefits—including partially paid leave for 12 months and unpaid leave for an additional 6 months—are designed so that European women, in particular, will bear more children in the coming years. Since female labor participation is highest in the European republics, paid leave will be the most help to them. So far, the policy has had some success; fertility in the European republics is increasing for the first time since 1960.

The most immediate consequences of this changing ethnic structure show up in the labor force. Already, entry-level workers are scarce in European Russia, where about 60 percent of all Soviet industrial activity takes place. They will become even scarcer in the coming years. The Soviet labor force gained 2.5 million workers between 1981 and 1985: Ninety-one percent of new workers were from Central Asia. The European labor force actually fell by 33 percent. A 41 percent gain in the proportion of "other nationalities" made up the difference, according to the U.S. Census Bureau.

The labor force problem is so severe that Soviet officials have tried to get surplus workers in the Asian republics to migrate to European republics. But Muslims have been unwilling to move to urban centers. Consequently, the Asian republics have remained significantly more rural than their European counterparts. The Asian republic of Kirgiziya was 40 percent urban in 1986, for example, while European Estonia was 72 percent urban.

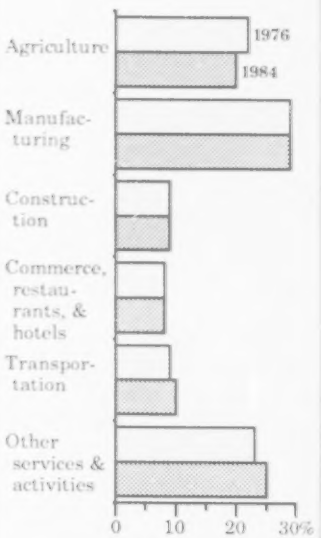
### *SQUELCHING SMIRNOFF*

Gorbachev's first risk as general secretary of the Communist Party was to try to cut the consumption of a

**WHERE THEY WORK**

*While most employment is strictly regulated, the number of service workers has increased in the past decade.*

*(Percent of U.S.S.R. workforce by industrial sector, 1976 and 1984)*




*Source: International Labor Office,* Yearbook of Labour Statistics, *1986, p. 374.*

**THE EASTERN MELTING POT**

*The U.S.S.R. will be characterized by increasing diversity until the end of this century.*

*(Major ethnic groups in the U.S.S.R., in thousands and percentage, 1959, 1979, 2000)*

| | *1959* | | *1979* | | *2000** | |
|---|---|---|---|---|---|---|
| *Ethnic group* | *Number* | *Percent of total* | *Number* | *Percent of total* | *Number* | *Percent of total* |
| U.S.S.R. (total) | 208,827 | 100.0% | 262,436 | 100.0% | 311,637 | 100.0% |
| Slavs | 159,280 | 76.3 | 189,207 | 72.0 | 219,668 | 70.5 |
| Balts | 4,715 | 2.3 | 5,310 | 2.0 | 8,131 | 2.6 |
| Muslims | 24,738 | 11.8 | 43,772 | 16.7 | 64,968 | 20.9 |

** Projections from Kingkade, W. Ward, "Demographic Trends in the Soviet Union," in* Gorbachev's Economic Plans, *study papers submitted to the Joint Economic Committee, Congress of the United States, 1987, tables 2 and 3.*

*Source: Feshbach, M., "The Soviet Union: Population Trends and Dilemmas,"* Population Bulletin, *vol. 37, no. 3, 1983, p. 22.*

notorious staple in the Soviet diet: alcohol. In the past decade, the Soviets devoted nearly as many rubles to drink as they did to food. Alcohol abuse actually caused life expectancy to fall from 65 years to 62 years for Soviet men and from 74 to 73 years for Soviet women between 1970 and 1979. Such a drop in life expectancy is unprecedented for an industrialized nation.

Before Gorbachev's anti-alcohol campaign began, in May 1985, as many as 12 to 15 million Soviets were alcoholics, according to Alex Vancube at the Population Reference Bureau. (Some anti-alcohol advocates' estimates in the Soviet Union run as high as 40 million.) The government has cut the production of alcohol by more than one-third over the past two years, imposed fines on drinking in public places, and set a high drinking age of 21 to curtail increasing teenage alcoholism.

Not surprisingly, these measures have been unpopular among many Soviets, who claim that the anti-alcohol campaign has meant only a longer, colder wait in line to buy spirits in state stores. Even so, retail sales of alcohol have plummeted by more than 50 percent in the past two years. "Buying vodka is an almost impossible exercise," says Dimitri Simes, director of the U.S.-Soviet Project at the Carnegie Endowment for International Peace.

But alcoholism is not the only dismal health-related indicator that flourished in the pre-Gorbachev era. Infant mortality was also on the rise. The number of children under age one that died for every 1,000 born rose from 23 in 1971 to 31 in 1976. The U.S. Census Bureau predicts that that rate will fall back to 25 deaths per 1,000 this year.

Some of the reasons for that unprecedented rise in infant mortality include influenza epidemics, poor prenatal care, a large number of abortions per woman, a decline in breast-feeding, a rise in single parenthood, and a delay in seeking medical attention for infants. U.S. demographers also suspect that a rise in alcoholism among women has contributed to the increase in the number of children born with birth defects.

### *FAMILIAR DEBATES IN UNFAMILIAR PLACES*

The Soviet Union has by far the highest abortion rate in the world. Sixty to 70

***BACK TO LIFE***

*Gorbachev's anti-alcohol campaign has sparked a recovery in Soviet life expectancy.*

*(Life expectancies at birth, 1968–71 through 1985–86, in years)*

| | *Both sexes* | *Male* | *Female* |
|---|---|---|---|
| 1968–71 | 70 | 65 | 74 |
| 1971–72 | 70 | 64 | 74 |
| 1978–79 | 68 | 62 | 73 |
| 1983–84 | 68 | 63 | 73 |
| 1984–85 | 68 | 63 | 73 |
| 1985–86 | 69 | 64 | 73 |

*Source: Vestnik Statistiki, 1974, no. 2, pp. 94–95, Narkoz, 1985, in Kingkade, W. Ward, "Demographic Trends in the Soviet Union," Gorbachev's Economic Plans, study papers submitted to the Joint Economic Committee, Congress of the United States, 1987, p. 176.*

***THE LABOR SHORTAGE***

*Slavic republics will lose the most workers around 1990, while Asian republics will gain them around 1995.*

*(Projected working-age population, in thousands, for the U.S.S.R. and selected republics, 1980–2000; men aged 16–59, women aged 16–54)*

| *U.S.S.R.* | *1980* | *1985* | *1990* | *1995* |
|---|---|---|---|---|
| **U.S.S.R. (total)** | 154,806 | 158,455 | 160,796 | 163,728 |
| **Slavic republics** | | | | |
| R.S.F.S.R. (Russia) | 83,791 | 83,543 | 82,462 | 81,817 |
| Ukraine | 29,289 | 29,250 | 29,237 | 28,975 |
| Belorussia | 5,727 | 5,861 | 5,886 | 5,908 |
| Moldavia | 2,323 | 2,410 | 2,493 | 2,593 |
| **Baltic republics** | 4,781 | 4,805 | 4,805 | 4,766 |
| **Transcaucasus** | 8,079 | 8,879 | 9,389 | 9,900 |
| **Central Asia** | 12,683 | 14,789 | 16,919 | 19,488 |

*Source: Based on Balduin, Godfrey S., "Population Projections by Age and Sex: For the Republics and Major Economic Regions of the U.S.S.R., 1970 to 2000," International Population Reports, series P-91, no. 26 (Washington, D.C.: U.S. Government Printing Office, 1979), in Feshbach, M., "The Soviet Union: Population Trends and Dilemmas," Population Bulletin, vol. 37, no. 3, 1983, p. 27.*

percent of all pregnancies in the U.S.S.R. are terminated by abortion, according to demographer Murray Feshbach's testimony to the U.S. Congress in 1983. Abortion is the country's major form of birth control. Each Soviet woman can expect to have as many as 6 abortions in her lifetime; some women admit to having 20.

Family life in the European republics is changing just as it is in the U.S. Divorce has become exceedingly common: Only 37 percent of marriages last more than three years, according to a July 6, 1986 report in *Moskovskaya Pravda*. The report cites financial troubles, "young" marriages, a lack of privacy, and conflicting work schedules as some of the main reasons for the high divorce rates.

### *RICH IN RUBLES, POOR IN PRODUCTS*

One in five Soviet workers is in agriculture. The remainder of Soviet labor is divided almost equally between industry and services. Thirty-nine percent work in the industrial sector, and 41 percent work in the service sector. Both sectors are heavily concentrated in urban areas—such as Moscow, Leningrad, and Kiev.

Soviet workers have saved billions of rubles over many years. This is not because they earn a lot of money—their average monthly salary is only US$320—but because there is not much to buy. Many products—such as meat, sugar, and toothpaste, as well as nearly every kind of household amenity, are either not in the state stores or are sold at grossly inflated prices.

The ruble with its official exchange rate (US$1.64 = 1 ruble) is, by some estimates, four times overvalued. State subsidies keep prices for some goods artificially low while prices for other goods are artificially high. Bicycle tires, for instance, officially cost only $4 in 1977, motorcycle tires officially cost $13, and rent is controlled at less than $30 a month. But some goods are extremely expensive. When available in 1984, apples cost $6.10 a kilo, coffee cost $5.55 for 125 grams, and a color television set cost $771 (more than two months' pay), according to Euromonitor. As more quality goods fill the now empty state-store shelves, the Soviets' billion-ruble hope chest will certainly shrink.

Sixty-five percent of Soviet households owned a refrigerator in 1984. Fifty-five percent owned a washing

### *TYING THE KNOT*

*One in ten Soviet women between the ages of 25 and 29 has never been married.*
*(Distribution of the U.S.S.R. population according to marital status in 1979,* by age and sex, in percent)*

| | *Men* | | *Women* | |
|---|---|---|---|---|
| *Age group* | *Never married* | *Married* | *Never married* | *Married* |
| total population aged 16 and over | 23.9% | 70.7% | 16.2% | 58.0% |
| 20–24 years | 59.9 | 38.4 | 35.5 | 60.2 |
| 25–29 years | 17.4 | 78.5 | 11.4 | 80.6 |
| 30–39 years | 6.1 | 87.8 | 4.8 | 82.8 |
| 40–49 years | 2.3 | 91.6 | 3.8 | 78.8 |
| 50–59 years | 1.2 | 93.0 | 5.5 | 64.8 |
| 60 and over | 0.8 | 85.4 | 3.7 | 28.3 |

** Note: This table does not include widowed or divorced men and women. Marriage rates are low in older age groups because of increased widowhood.*

*Source: "Naselenie S.S.S.R.: Spravochnik," Moskva:* Izdatel'stvo politicheskoi literatury, *no. 12, 1983, p. 89.*

### *CHEAP FIX-ITS*

*Large appliances have been relatively inexpensive to repair per unit, but the nation's total repair bills have been high.*
*(Ownership per 1,000 population, and cost of repairing household appliances, in U.S. dollars, 1977)*

| | |
|---|---|
| **Refrigerators** (per 1,000 population) | 210 |
| Average repair cost (US$) | 16.81 |
| Total repair cost (US$ millions) | 101 |
| **Washing machines** | 200 |
| Average repair cost | 14.32 |
| Total repair cost | 22 |
| **Vacuum cleaners** | 64 |
| Average repair cost | 9.87 |
| Total repair cost | 20 |
| **Cameras** | 80 |
| Average repair cost | 7.76 |
| Total repair cost | 22 |
| **Clocks or watches** | 1,408 |
| Average repair cost | 4.92 |
| Total repair cost | 268 |
| **Sewing machines** | 184 |
| Average repair cost | 7.68 |
| Total repair cost | 11 |

*Source: Heinemeier, Meredith,* 1977 Consumption by Industrial Sector in the U.S.S.R., *Center for International Research, U.S. Bureau of the Census, 1986, pp. 46–47.*

machine, and 38 percent owned a television set. There were 25 people for every passenger car in 1984. More free market activities are likely to make those and other goods easier to get, but most Soviets fear steep price increases will accompany change.

### *EVERY SECOND COUNTS*

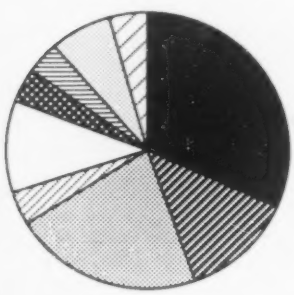
Wherever you come from, there are never enough hours in a day. The first U.S.-U.S.S.R. joint time-use study, run by the Soviet Academy of Sciences and the University of Maryland, illustrated the truth of that universal complaint when researchers asked residents of Pskov, Russia, and of Jackson, Michigan, how they spend a typical day.

Soviet men and women spend more time on the job than do Americans, according to preliminary results. Soviets spend less time socializing away from work than Americans—they spend 22 minutes a day having fun with friends, while Americans spend 65 minutes. Reading is much more common in the Soviet city than in the American city. Pskov residents spend 42 minutes a day reading, while Jackson residents spend 27 minutes. Not surprisingly, Americans watch more television.

But where do you go for a good time in Pskov? Not where you go in Jackson. Jacksonites rate eating out as their favorite activity; people in Pskov give circus watching the highest marks. Other favorite activities in Pskov include going to the library, to the movies, and to museums and discos.

By Western standards, Soviet women have it rough. Lacking household conveniences, those tireless comrades put in 39 hours a week at their jobs and about 10 hours a week on family chores. Jackson women average 24 hours a week at work, since fewer women are employed outside the home. Women in Pskov spend 140 minutes each day cooking, washing clothes, and taking care of kids. Jackson women spend only 95 minutes a day on those activities.

***EATING RUBLES***
*Soviets spend almost half their budget on food and drink.*
*(Percent of total expenditure by commodity, U.S.S.R., 1980)*



- Food 32%
- Beverages and tobacco 13%
- Clothes, footwear, personal goods 22%
- Household services, utilities 4%
- Consumer durables 11%
- Health services 4%
- Transportation, communication 4%
- Recreation, cultural services 7%
- Other goods and services 4%

*Source: U.S. Congress Joint Economic Committee, in* European Marketing Data and Statistics 1986/87, *Euromonitor Publications, p. 285.*

***PRECIOUS TIME***
*Soviets have fewer minutes each day to spare on activities like watching television.*
*(Free time spent on various activities in the U.S.S.R. and U.S.A., in minutes per day, 1987; 24 hours = 1440 minutes)*

| *Activity* | *Pskov, Russia (U.S.S.R.)* | *Jackson, Michigan (U.S.A.)* |
|---|---|---|
| Sleeping and resting | 497 min. | 474 min. |
| Watching television | 109 | 149 |
| Grooming | 55 | 71 |
| Food preparation | 50 | 34 |
| Eating | 48 | 61 |
| Driving and travel (not work-related) | 44 | 59 |
| Reading | 42 | 27 |
| Cleaning house | 27 | 43 |
| Child care | 27 | 17 |
| Other entertainment | 25 | 18 |
| Shopping | 21 | 29 |
| Laundry | 20 | 11 |
| Other housekeeping | 17 | 24 |
| **Total** | **982** | **1017** |

*Source:* Soviet-American Use of Time Project, *joint study by the Survey Research Center of the University of Maryland and the Institute for Sociological Research of the Soviet Academy of Sciences. American project director: John P. Robinson; Soviet project directors: Vassily Patruchev and Vladimir Andreyenkov; previewed in* The Washington Post National Weekly Edition, *11/16/87, p. 37.*

*LET'S MAKE A DEAL*

Although all things Western may be the rage for Soviet consumers, Gorbachev's agenda will make some products more likely candidates for trade than others. Clearly, labor-saving devices and basic computer technology offer a host of applications for sluggish Soviet industries. Personal computers, reliable machinery, and even robots can help with labor shortages.

Health care products, from stethoscopes to tampons, are in great demand. Given the official desire to make preventive care a reality for the majority of Soviet citizens, imports of all kinds of medical technology should increase. Imports of entertainment and leisure products are proceeding on a limited basis as well. In the past, Soviets have shown a voracious appetite for Western movies, jazz, literature, and art.

*Glasnost* and *perestroika* may have won the minds of many intellectuals who crave access to culture, but winning the hearts of workers may be a bloodier fight. It will take "more than promises, more than the brave rhetoric of change" for Gorbachev to convince the working population that reform is in its best interest, notes Dimitri Simes. Patience will be the Soviet Union's most valuable resource. And it will serve American exporters well, too.

*SOURCES*

Demographic information on the Soviet Union is hard to find. The most comprehensive data come from the Center for International Research at the U.S. Bureau of the Census. Soviet specialist W. Ward Kingkade analyzes the current demographic situation in "Demographic Trends in the Soviet Union," part of a compen-

*(continued on p. 13)*

*(**Lifestyles,** continued from p. 1)*

ceive more money for breast-feeding. French women receive a bonus only if they make three prenatal visits to a physician.

Parental leave is not feared by European employers as it is by many American companies. The length of maternity leave varies from six weeks to six months, but nearly every country pays 80 to 100 percent of a woman's salary during her time away from the job. Greece, Ireland, the Netherlands, and Switzerland provide the shortest paid leave—fewer than 13 weeks. Italy, Sweden, Luxembourg, and Eastern European countries provide the longest leave at full pay—between 20 and 40 weeks. Paternity leave is granted to fathers in Norway (up to 12 weeks) and in West Germany.

And for those parents who want to see little Henri speak his first word, take his first step, or throw his first temper tantrum, unpaid leave is an additional option. France and West Germany are especially lenient in that regard, offering parents from one year to three years off with job security.

Idiosyncratic aspects of European maternity programs include laws that prohibit pregnant women from working at night in Belgium, West Germany, the Netherlands, and Switzerland and that require nursing breaks for French or Norwegian working women. In the Netherlands aides called "maternity helpers" spend about eight hours a day cooking, shopping, housekeeping, and caring for a newborn child during the first two weeks after delivery.

Most countries even offer a "family allowance" that is paid to the economically active parent while a child goes to school. France and Sweden encourage more births by withholding those allowances until the birth of a second or third child. The Polish allowance supports families that fall below a minimum income level.

*—Blayne Cutler*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# DISCOVER TIANJIN, PEOPLE'S REPUBLIC OF CHINA

**China's third largest city gives exporters access to the north.**

Tianjin occupies a strategic location in contemporary China, with the Bohai coast to the east, and Beijing about 140 kilometers to the northwest. As the nation's third-largest city, Tianjin (formerly Tientsin) is often overlooked by Westerners, who are familiar with Shanghai, Beijing, Guangzhou (Canton), or Nanjing. Yet with a population of over 8 million inhabitants—almost 70 percent of them urban*—Tianjin is one of the most accessible cities in the world's most populous country.

## UNDISCOVERED MARKETS

In 1982 Tianjin produced almost 4 percent of China's gross industrial output, ranking second only to Shanghai in industrial output per person. Tianjin rivals Beijing as a key center of higher education and as a growing hotspot for marine-chemical, textile, and petrochemical industries.

Twenty-nine colleges and 148 research institutes are situated in the city, as are about 4,000 industrial enterprises. In addition, government officials designated Tianjin a "coastal city" in 1984 and gave the city special priority in 1985 as a site for joint-venture operations. More than 100 joint-venture contracts have already been signed between the Tianjin municipality and companies such as SmithKline Beckman (pharmaceuticals) and Otis Elevator Corporation.

Tianjin is one of three municipalities directly administered by the central Chinese government. Beijing, Shanghai, and Tianjin have the status, responsibilities, and powers of a province. That gives Tianjin officials the freedom to negotiate directly with foreign firms and investors and to approve international economic agreements for deals up to US$30 million.

Tianjin's population has grown rapidly since the Chinese Communists assumed control of the country in 1949. The number of urban residents in the city increased from just over 2.5 million in the early 1950s to more than 5.5 million at the end of 1985.

During the early 1980s the birth rate in Tianjin was relatively high, even though about 94 percent of all births were first births. This high first birth rate is explained by the fact that the official minimum marriage age was lowered in 1981 and that large numbers of people are reaching childbearing age. Future birth rates, however, are expected to be low, since the marriage effect is tapering off, and the number of people of child-bearing age will eventually decline.

Tianjin's artificial harbor, Xingang (New Harbor), is on the Bohai coast, about 50 kilometers from the city proper, in the city's Tanggu District. The port is the largest in China for foreign trade, and it is second only to Shanghai in cargo-handling capacity. Freight volume at Xingang exceeds 10 million tons, and 25 berths serve cargo ships and international transshipments.

Tianjin is also one of the hubs of the national railway network. The major line that connects Beijing with northeastern China (still known to many foreigners as Manchuria) runs through Tianjin, as does the most efficient railway line in the country, the one from Beijing to Shanghai.

The city is further connected to the outside world through one of China's more advanced telephone networks. British Telecom is helping the city install nearly 200,000 telephone lines capable of direct dialing to Hong Kong and other cities. Telegram and telex services also link the city to more than 20 provinces and municipalities.

China's plans for the future of Tianjin figure prominently in the national economic restructuring that began with Deng Xiaoping's modernization campaign in 1979. The country's Seventh Five Year Plan (1986–90) is

### *NORTHERN RETAIL CENTER*

*Tianjin rivals Beijing as northern China's most prosperous retail center. (Demographic and economic data for Tianjin, 1985)*

| | |
|---|---|
| **Population size** | |
| municipality | 8,080,000 |
| urban share | 5,650,000 |
| **Industrial enterprises** | |
| municipality | 4,649 |
| urban share | 3,764 |
| **Industrial output from consumer goods** (in US$ billion) | |
| municipality | 3.84 |
| urban share | 3.74 |
| **Retail trade units** | |
| municipality | 38,775 |
| urban share | 26,443 |
| **Retail sales** (in US$ billion) | |
| municipality | 1.53 |
| urban share | 1.29 |
| **Service trade units** | |
| municipality | 12,946 |
| urban share | 10,036 |

*Source: Population data are from State Statistical Bureau,* Chinese Statistics Yearbook, 1986, *State Statistical Publishing House, 1986, p. 92. Other data are from State Statistical Bureau,* 1985 City Yearbook of China, *State Statistical Publishing House, 1985 (in Chinese), pp. 75, 83, 286, 301, 309, 467.*

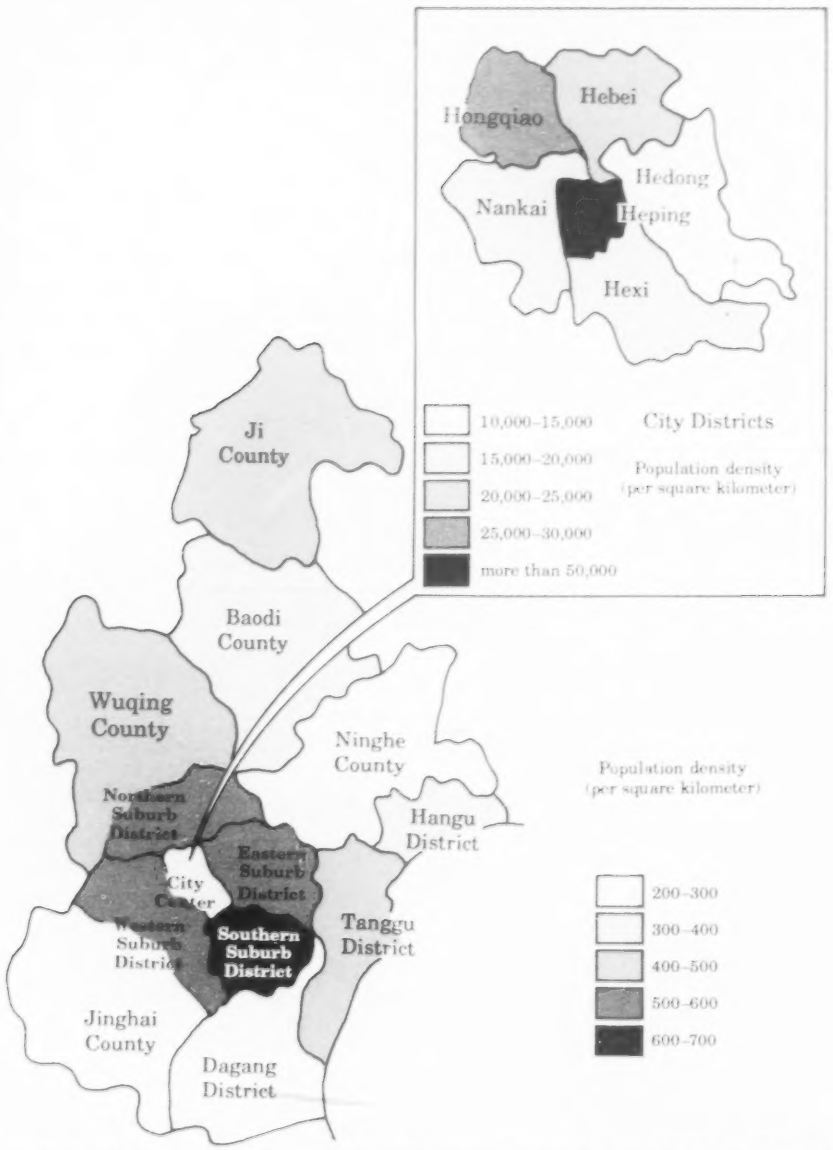
** Unlike cities in the West, Chinese cities, by definition, include the actual cities and surrounding urban and rural areas that are economically linked to the city. "City" is equivalent to the term "metropolitan area" in the U.S.*

directed in part toward increasing production and promoting exportable goods, maintaining full employment, and accelerating the construction of housing and other public facilities in Tianjin. Chinese leaders currently are planning to accelerate the development of Tanggu (Tianjin's satellite port city), which will lead to a Tianjin-Tanggu corridor. Developers are also working toward creating a regional triangle that will link the three cities of Tianjin, Beijing, and Tangshan (in southern Hebei Province).

*—Dudley L. Poston, Jr.*
*Professor of Sociology*
*University of Texas*

### *WHERE TIANJIN RESIDENTS LIVE*

*The Tianjin People's Municipal Government comprises the city center (situated in the south-central part of the municipality), four central urban districts, three urban coastal districts (including the port district of Tanggu), and five rural counties.*
*(Population per square kilometer for districts and counties of Tianjin Municipality, 1983)*




*Source: Wilmoth, D. and Forbes, D., "Opportunities for Urban Planning in Tianjin, China," delivered at the International Conference on Urbanization and Urban Population Problems, Tianjin, China, 26–30, 1987, p. 7.*

### *SPREAD THIN*

*People in Tianjin make every yuan count.*
*(Per capita total living expenditure, in dollars, and share, in percent, Tianjin, 1983)*

| | *Expenditure (US$)* | *Share (%)* |
|---|---|---|
| Total | 170.31 | 100.0% |
| Food | 83.03 | 48.8 |
| Housing | 30.57 | 18.0 |
| Clothes | 21.46 | 12.6 |
| Articles for daily use | 20.84 | 12.2 |
| Fuel | 6.51 | 3.8 |
| Culture and services | 3.32 | 1.9 |
| Other articles | 2.55 | 1.5 |
| Medicine, medical articles | 1.91 | 1.1 |
| Reading materials | .13 | .1 |

*Source: State Statistical Bureau, Statistical Yearbook of China, 1984, in Taylor, J. and Hardee, K., Consumer Demand: A Statistical Factbook, Center for International Research and International Statistical Programs Center, U.S. Bureau of the Census, pp. 156–161.*

# PHONES THAT SEE, HEAR, AND CALCULATE

**Reach out and touch someone? Forget it. Soon you'll be able to read their minds long distance. Well, almost.**

The marriage of telephones and computers is resulting in the digitizing of telecommunications networks in the United States, Europe, and Japan. Such a transformation represents the greatest innovation in communications technology since the cup against the wall was upgraded to the

PRODUCT COMPARISON

telephone a century ago. Companies that don't take advantage of these split-second global links will become as outdated as the crank phone at the corner grocery.

In the past, whenever someone dialed a telephone, the call went through a telephone exchange—a large network of electromechanical "switches." The switch processed the number dialed and directed it to the corresponding line. One ring, bleep, beep, or blip and you were chatting with Aunt Eunice in Peoria.

So how is that changing? Through digitizing, those analog signals are converted into binary digits, a process that will enable Alexander Graham Bell's brainchild and Steven Jobs's brainchild to merge: Telephones will soon have computer capabilities even for home use. Banking, shopping, letter writing, and visiting will all be done through a receiver and a screen.

Most of the wealthy nations of the world will be digitized by the early 1990s. France has a jump on everybody in the digital-switch revolution. Currently 50 percent of France's local exchanges and 60 percent of its long-distance exchanges are digital. By

PRODUCT COMPARISON

1990, 70 percent of 27 million French subscribers will be serviced by digital transmission. But other nations in the European Economic Community (EEC) lag behind. Britain, recovering from manufacturing setbacks of the 1970s, is moving sluggishly. Of the 20 million subscribers in 1990, 42 percent will receive local digitized service. West Germany also has been slow to convert: Less than one quarter of its long-distance service will be digitized in the next two years.

Poorer European nations, such as Ireland, Greece, and Portugal, await nearly $700 million in investment funds from the EEC to modernize their telecommunication networks. The EEC hopes to achieve a common telecommunication standard by 1993. Its long-range goal emphasizes the creation of an integrated European market capable of competing with the U.S. and

***THE FUTURE OF DIGITAL TELECOMMUNICATIONS***

*OECD countries will try to surpass France's lead in the digitization race by 1990. (Number, in millions, and percentage of European subscribers to digital telecommunications, and percentage of digitized local and long-distance switching, by 1990)*

| *Country* | *Subscribers: main lines (millions)* | *Transmission digitized (percent)* | *Local switching digitized (percent)* | *Long-distance switching digitized (percent)* |
|---|---|---|---|---|
| Belgium | 4.0 | 50% | 29% | 75% |
| Denmark | 3.0 | 85 | 23 | 40 |
| France | 27.0 | 70 | 70 | 75 |
| Greece | 4.5 | 15 | 15 | 25 |
| Ireland | 1.2 | 70 | 65 | 85 |
| Italy | 21.7 | 45 | 25 | 36 |
| Luxembourg | 0.2 | 35 | 8 | 10 |
| Netherlands | 6.3 | 95 | 35 | 15 |
| Portugal | 19.5 | 70 | 20 | 30 |
| Spain | 12.2 | 47 | 5 | 45 |
| United Kingdom | 20.0 | 100 | 42 | 90 |
| West Germany | 28.6 | 50 | 3 | 22 |

*Source: European Conference of Postal and Telecommunications Administration (CEPT) and Commission of the European Community, in "Reforming Telecommunications Policy in OECD Countries," OECD Observer, Oct./Nov. 1987, p. 20.*

Japan. Fewer than one-third of all exchanges in the U.S. are digital. In Japan 15 percent of local exchanges and 40 percent of long distance exchanges have been converted.

Third world nations, scrambling for the most basic telecommunication services, might benefit from getting a late start in the digital race. When digital communications finally arrive in poorer countries, they will provide direct access to a world of information networks that might speed technology transfer without the costly drain of research and development.

For the average telephone customer, the immediate advantages of digital communications are clearer lines, itemized bills (a luxury outside of the U.S.), improved automatic transfer of calls, and paging services. The long-term benefits *should be* cheaper, more efficient service. But initial investments, including the replacement of copper wire with fiber optics, will keep telephone rates high for some time.

As if those telecommunication breakthroughs are not mind-boggling enough, scientists and engineers are working on integrating the whole lot of digital telecommunication services into one gargantuan circuit: the Integrated Services Digital Network (ISDN).

In the simplest of terms, ISDN is a public communication network capable of carrying a variety of data services (fax machines, telexes, videotexes, telewriters, databases, etc.), including voice, *simultaneously* over the same line without any interference. Private companies can already get services linked like this through leased lines and networks called multiplexers. But ISDN offers something more universal: an attempt to establish a world telecommunication standard.

Customers will be able to get information immediately, regardless of how or where it is kept. In other words, ISDN will be to telecommunication equipment what alternating current is to the desk lamp, toaster, or TV set. As a "universal plug" ISDN offers the possibility of an efficient global marketplace, where information transfer is as easy as calling your next door neighbor. ISDN will be making cameo appearances next year in the U.S., Japan, France, Britain, and West Germany. If successful, it could be in full swing as early as 1990.

*—Franklyn Crawford*

INTERNATIONAL DEMO MEMO

***Total number of cinemas and theaters:***

| | |
|---|---|
| Tianjin, People's Republic of China (pop. 5.5 million) | 75 |
| Chicago, Illinois, United States (pop. 3.0 million) | 173 |

*Note: Population figures are for 1985.*
*Sources: Statistical Abstract of the United States 1987; China Urban Statistics 1985.*

***(U.S.S.R. profile,** continued from p. 9)*

dium called *Gorbachev's Economic Plans*. It is available from the Superintendent of Documents, Congressional Sales Office, U.S. Government Printing Office, Washington, DC 20402. Another source of information is the Population Reference Bureau's *Population Bulletin*, volume 37, number 3, available from the bureau, 777 14th Street NW, Suite 800, Washington, DC 20005. Information about the Soviet-American Use of Time Project conducted by the Soviet Academy of Sciences and the University of Maryland is available from Professor John P. Robinson, Survey Research Center, 1103 Art-Sociology Building, University of Maryland, College Park, MD 20742-1321.

*—Blayne Cutler*


## *Japan's New Consumers*

*You can find out more about Japanese lifestyles, attitudes, demographic characteristics, spending patterns, and buying behavior in* **Japan's New Consumers,** *a new two-part special report written by experts from the Center for International Research of the U.S. Census Bureau and the editors of* Consumer Markets Abroad.

*A hardbound book with over 100 charts, graphs, and tables,* **Japan's New Consumers** *clearly describes how and why the Japanese spend their earnings on consumer goods and services.*

**Japan's New Consumers** *also looks at the Japanese business climate, which is characterized by heated competition among manufacturers who produce high-quality, low-priced goods for consumers who have been described as the "fussiest" in the world. You will learn exclusive details of what the Japanese look for in terms of design, service, personal contact, packaging, and credit, and their attitudes toward imports.*

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# REGIONS: CONSUMER TRENDS AROUND THE WORLD

**Too much apple pie and Chevrolet.** Fully 58 percent of Canadian television viewers say that the American media have "too great an influence on the Canadian way of life," according to *The Media Study,* a two-volume report by Environics Research Group.

American dominance of other Canadian media, however, is not as great. Fewer than half complain of American bombardment in maga-

zines or radio, while only 29 percent acknowledge the problem in their daily newspapers.

But news coverage is "Yankeefied," since two-thirds of all Canadians get their national and international information from the tube. Only 20 percent of Canadians read the newspaper to understand world affairs. They use newspapers most often, however, to find out about products or services.

For more information on Canadian media preferences write Environics Research Group, 45 Charles Street East, Toronto, Canada M4Y 1S2, or call (416) 964-1397.

**Looking to hire Canadian workers? Help-wanted ads may be your best bet.** Statistics Canada reports that job ads became more popular between 1977 and 1986, while employment agencies became less popular with job seekers.

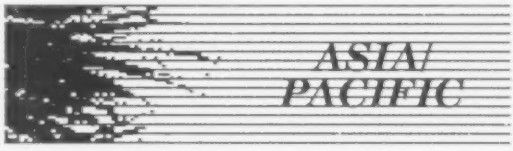
Forty percent of job seekers used public employment agencies in 1986, down 20 percentage points from 1977. Only 5 percent used private employment agencies during their job search, and women used them more frequently than men.

Directly contacting employers was the most common job-search method, according to Statistics Canada. Contacting union representatives is a common method for men, as is checking with friends and relatives.

Find out more about job-search methods in Canada by contacting the Labour and Household Surveys Analysis Division of Statistics Canada at (613) 951-4626 or write to Statistics Canada, R. H. Coats Building, Tunney's Pasture, Ottawa, Ontario, Canada K1A OT6.

***For the Japanese, fulfillment means more than owning a Toyota hatchback, a Sony Walkman, and a Minolta camera: More than one-third of all Japanese report that they are "unsatisfied" with their lives,*** according to the 1987 Public Opinion Poll on National Life issued by the Prime Minister's Office.

Nearly half of all Japanese men in their late 30s report dissatisfaction with their lives, according to the poll. Those men, who are of prime working age, are more discontent than any other Japanese group. Women are more satisfied than men at every age up to age 70. The greatest areas of gloom involve income and savings. One-tenth of all Japanese are "extremely unsatisfied"




with their present level of income, and nearly half are "rather unsatisfied." As for the size of their personal yen stock, 15 percent are "extremely unsatisfied," and 51 percent are "rather unsatisfied."

Leisure time is another rare commodity, according to 51 percent of those polled. And contrary to the popular notion of the selfless 80-hour-a-week company employee, university graduates lead the pack in choosing more free time over pay raises wherever possible.

The Japanese indicate that they are ready for spiritual rather than material pleasure. Fifty percent seek new ways to "nurture richness of the heart." For more information on Japanese happiness contact *Focus Japan Desk,* JETRO, 1221

Avenue of the Americas, New York, NY 10020; (212) 997-0400.

***Look for new Indian markets in Australian and New Zealand cities. Indian professionals have immigrated from Fiji in droves since the military coup there in May 1987.***

While many Indian traders have stayed on the 105 islands that make up Fiji, Indian doctors, dentists, teachers, and other professionals are seeking safety Down Under since they lost political clout in Fiji last spring.

Native Fijians, who numbered 19,000 fewer than Fiji's 350,000 Indians in the 1986 census, fought to gain control of their country from the politically dominant Indian community.

While native Fijians may have felt outnumbered before the coup, they have been gaining numbers faster than any other local ethnic group. The Fijian population grew by 27 percent in the past decade while the Indian population only grew by 19

percent, according to the International Planned Parenthood Federation. Because of rapid Indian emigration from Fiji, the Fijian and Indian populations are projected to equal out in the coming year.

## *SEEING IS BELIEVING: CHINA'S TRICKY TRADE ON FILM*

**The China Business Briefing,** a Business Week Executive Video produced by Hawkshead Communications, written by Bob and Sally Garratt, Business Week Management Group, 1221 Avenue of the Americas, New York, NY 10020, 75 minutes, $795.

Since the days of the ancient Silk Route, marketers have been fantasizing about China. Their fantasy goes something like this: If I could sell just one pair of socks to every Chinese, I'd not only keep 2 billion feet warm but I could also retire forever. Through the tales of seasoned China traders, Business Week Executive Video's *The China Business Briefing* seeks to eradicate those and other myths for marketers whose gaze has turned longingly east.

In its two-part presentation and accompanying text, *The China Business Briefing* highlights the pitfalls (first) and the potential (second) involved in signing a contract with the People's Republic of China. That self-described "caution" is deliberate. "One cannot bring familiar Western business frames of reference to China and expect them to work without adaptation, as many have tried to do," note authors Bob and Sally Garratt. Problems such as foreign exchange shortages, transportation delays, and cultural insensitivity, they argue, will certainly arise.

The videos seek to capitalize on others' mistakes as valuable learning tools. Interviews with key players in the China divisions of five large corporations (General Electric, H.J. Heinz, Mottahedeh, NIKE, and Racal) can stun the viewer with how daunting contract setbacks can be. In the case of General Electric, a seemingly closed deal was suddenly tabled for four years because economic priorities were "reorganized" on the national level. It took seven years for the sale of G.E. locomotive engines to be approved by Chinese officials.

And seven years is not an uncommonly long time. Other frustrations include attempts by NIKE executives to convince Chinese factory managers that white sneakers were preferable to gray (the color they became from the coal-polluted Tianjin air). And upscale porcelain dealer Mottahedeh had to return products to China for

*(continued on next page)*

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(***Publications,*** *continued from p. 15)*

reglazing repeatedly.

In conveying the advice that business in China actually can be profitable despite obstacles, *The China Business Briefing* succeeds. Businesspeople who contemplate overseas investment projects rarely are able to peek into the offices of competitors and ask what went wrong and why.

In making use of the video medium, however, the project falters. The introductory video includes some beautiful scenes of rural China, and viewers get a chance to see what Chinese factories look like. The video devotes too much time, however, to interviews.

The complete Business Week package costs $795. The most efficient use of the videos would be as part of a training program for prospective on-site managers or as a seminar supplement.

P U B L I C A T I O N S

**Spain in the 1980s: The Democratic Transition and a New International Role,** edited by Robert P. Clark and Michael H. Hatzel, 1987, Ballinger Publishing Company, 54 Church St., Harvard Square, Cambridge, MA 02138-3730, $29.95.

Many global marketers still view Spain in caricatures. Images of bullfights, flamenco dancers, and brooding Moorish landscapes, although part of the Spanish culture, do little to reveal the country's unique economic vitality. *Spain in the 1980s,* a collection of specially commissioned studies from the Woodrow Wilson International Center for Scholars, provides a more realistic glimpse of life in modern Spain.

In the book, a variety of experts examine the complex political history and the skillful policy-making that have resulted in Spain's decade-long metamorphosis from a troubled authoritarian regime to a consolidated democracy—a chain of events that marketers need to understand in order to reach Spanish consumers. The book also addresses the ways in which *la transición* might affect Latin America and other third-world regions.

Bolstered by a vibrant industrial sector and a burgeoning middle class, Spain has emerged as a western-style consumer nation. But the idiosyncracies of the Spanish culture elude the common definition of "modern." *Spain in the 1980s* illuminates some of the more subtle aspects of the collective Iberian mind.

*—Franklyn Crawford*

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